# Sales and Project Engineering for Investment Goods – with P'X5™ powered by Perspectix

It's great when you find a customer whose requirements match your own product portfolio to generate an economic advantage for both of you. But now the difficult and time consuming part of the sales process begins:

- The configuration of an individual solution that takes into account the complex interdependencies of the customer, coupled with knowledge of the variant and technical possibilities of the product spectrum.
- The palette of one's own and add-on products, hardware and software, delivery and service options, all economically priced yet still profitable for you.
- The challenging design and layout planning.
- Consistent generation of parts lists and documentation for customers, suppliers, fabrication, and assembly.
- Collaborative project execution between manufacturer, partners, and customers.

In organizations with multiple sales levels, these challenges must be met in order to ensure error-free work and communication – across all levels, from field sales to the sales back-office, technical sales engineering, and project management and planning. The solution: P'X5 from Perspectix.
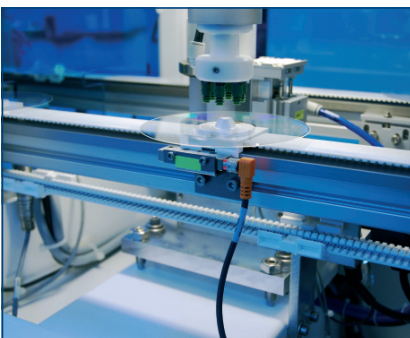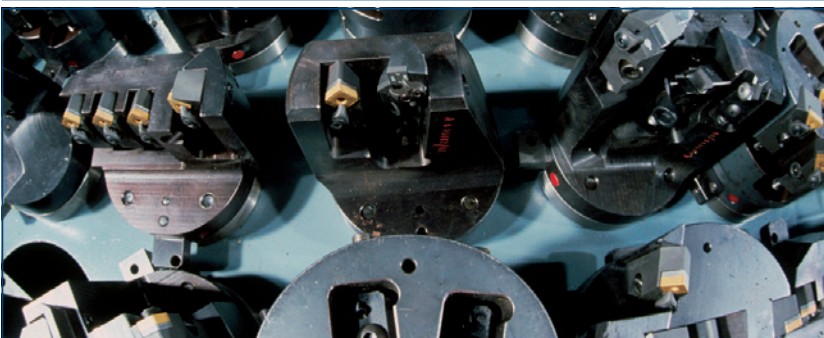
- **Product knowledge management**
- **Requirements management**
- **Product configuration**
- **Price calculation**
- **Offer generation**
- **Technical project planning**
- **Layout planning**
- **Sales engineering**
- **Solution presentation, documentation, and print-out**
- **Parts lists for order processing and after-sales service**
- **CAD/PDM and ERP integration**

P'X Perspectix AG

The key to success: sales-oriented software tools and a well-defined product knowledge base
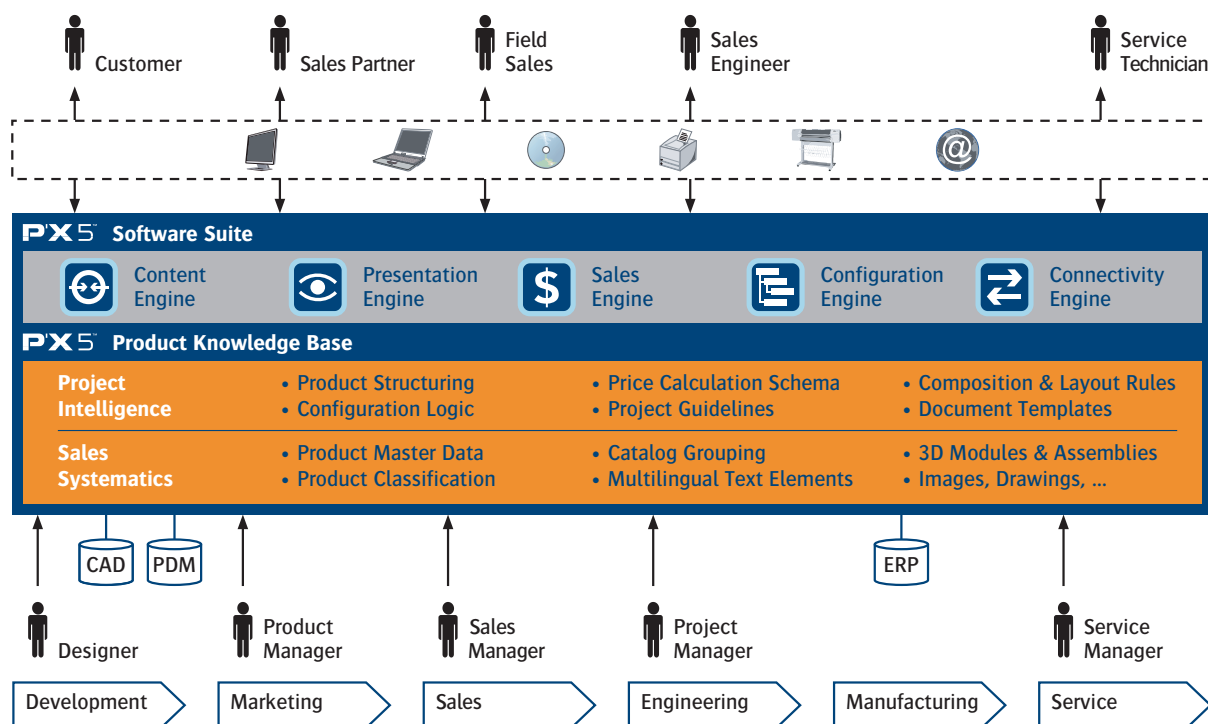
Integrated Product Knowledge

With P'X5, Perspectix delivers the key to meeting the sales challenges of components, machines, and plants. In the P'X5 product knowledge base, all relevant product information is systematically brought together in an appropriate form for marketing and sales.

At the level of master and order data, CAD/PDM tools, ERP, and CRM systems are integrated into a well-defined, well though-out data infrastructure that can meet the needs and demands of technical sales.

At the level of the individual offer, all mechanical, pneumatic, hydraulic, electronic, software, and other product elements are configured and specified. With this solid foundation, additional aspects such as engineering, assembly, commissioning, testing, maintenance, and financing can be defined and integrated into a complete offer. With interfaces to existing IT systems, P'X5 builds bridges between the sales, engineering, fabrication, and service departments.

Knowledge-based Project Engineering

Integrated product information is intelligently enhanced in P'X5. Thanks to knowledge-driven automation, customer-specific project planning can be executed efficiently and free

of error. Knowledge of product lines, valid or invalid variants, and configuration restrictions can be aggregated with other boundary conditions in a consistent rule system. This knowledge extends itself into the areas of layout planning, price calculation, project structuring, and after-sales service. Geometric-spatial and parametric-logical constraints are respected, as are any relevant commercial conditions. In addition, P'X5 solves all sales-related parts lists problems: different formulations for order management, construction, fabrication, assembly, delivery logistics, and spare parts management are automatically kept in sync and up to date.

Persuasive Solution Communication

Nothing can convince customers as reliably as a virtual presentation of their new machine or plant in 3D. When they can interactively request modifications and special needs, and dynamically try out alternative configurations, all while simulating the final installation in the plant, the ultimate solution you find together will already be their preferred offer, even before the sales process is finished. Superb animated 3D presentations awaken the interest of decision makers, from the boardroom to the factory floor. P'X5 thereby provides a dramatic competitive sales advantage.

P'X5™ for Product Management

- Master data harmonization and integration for a continuous unified product knowledge base
- Product structuring, classification, and modeling
- Well thought out product systematization for sales, planning, and spare parts management
- Sales-oriented product knowledge management
- Up-to-date product information for web catalogs, technical documentation, and configurators
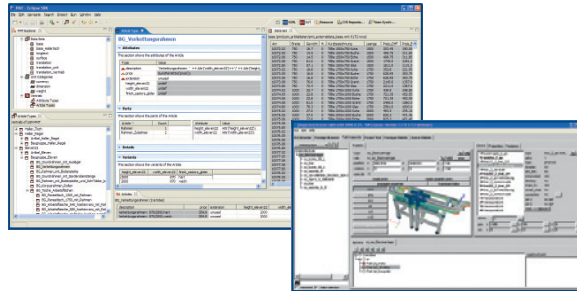
P'X5™ Product Management Tool

P'X5™ Authoring Workbench

P'X5™ for Sales

- Project-oriented sales from the desktop, laptop, and internet
- Customer data and contact management
- Systematic requirements survey
- Offer, product, and service configuration in 3D, 2D, and text
- Rule-based solution plausibility checking
- Continuous price determination and margin calculation
- Multi-language and multi-currency
- Automatic offer generation and output
- Parts lists generation for order management
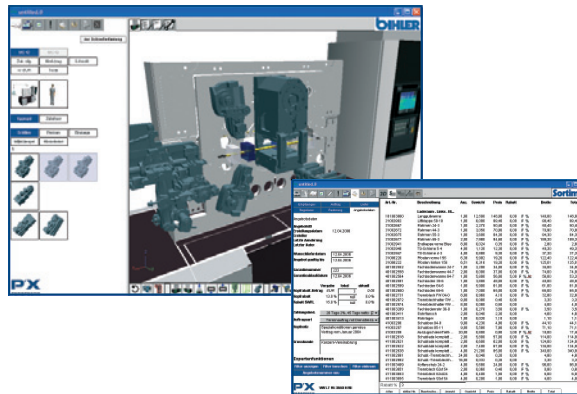
P'X5™ Configurator

P'X5™ Calculator

P'X5™ for Technical Project Planning

- Rule-based technical design
- Spatial module assembly and layout planning, including dimensioning in 3D/2D
- Generation and processing of project structures, parts lists, and work plans
- Multi-CAD interface for sales engineering
- Parts lists transfer for project and order processing
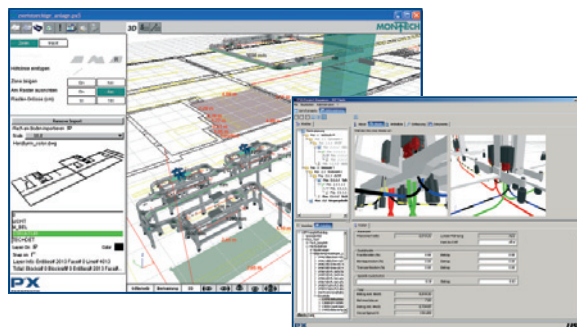
P'X5™ Layout Planner

P'X5™ Project Organizer

P'X5™ for After-Sales Service

- Provision of up-to-date technical documentation
- Derivation of order-specific service documentation
- Parts lists management and change management for a customer-specific installed base
- Views and documentation for assembly and disassembly during installation and maintenance
- Knowledge-based spare parts management including 3D drill-down to find specific parts
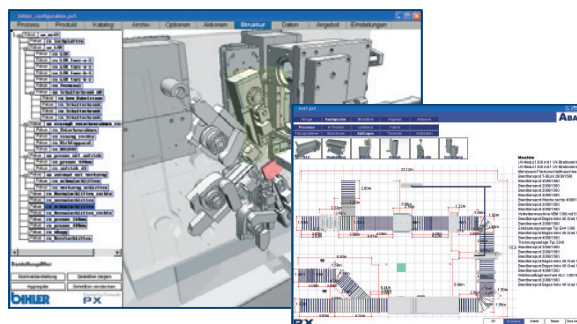
P'X5™ Installed Base

P'X5™ Tech Doc

P′X5 Software Suite

P′X5 is a powerful standard software suite for optimizing the central tasks in the marketing and selling of investment goods. Five "engines" form the nucleus of the P′X5 software suite:

P′X5 Configuration Engine

Masters the most complex configuration tasks, provides spatial planning functionality, and controls the generation and mutation of parts lists for sales, production, and service.

P′X5 Sales Engine

Provides functions for the e-catalog, project-oriented sales, sales-oriented calculation and price determination, offer generation and order processing.

P′X5 Presentation Engine

Provides comfortable interaction and visualization in 3D, 2D, and text; supports the generation and output of various documents such as Word and PDF, among others.

P′X5 Connectivity Engine

Permits the smooth exchange of master and order data between P′X5 and the CAD, PDM, ERP and CRM systems in the IT backbone.

P′X5 Content Engine

Provides product knowledge managers with powerful tools for harmonizing sales-related product information, as well as for maintaining the product knowledge base.

Perspectix – Industry Know-How included

With the combination of sales optimization and Product Lifecycle Management in a forward-looking technology, Perspectix is a strategic supplier for renowned manufacturers and a partner with leading IT vendors – including UGS, Autodesk, PTC, Solidworks, Microsoft, and Adobe, as well as leading SAP system integrators.

Based on proven competence and in-depth experience, Perspectix's experts provide premium services, focusing on:

- Product structuring and modeling
- Product data harmonization
- Product knowledge and variant management
- PLM-integrated IT architectures for technical sales
- Process optimization in product management and sales
- P′X5 customizing, project and change management
- Training, maintenance, and support for P′X5 solutions
- Customer specific software engineering

Perspectix stands for innovation based on a solid foundation of long experience and tried and tested technology. Our primary goals are a striking reduction in process costs in sales, significant increase in revenue potential, strengthening of customer loyalty, and a continued differentiation from the competition. Profit from our know-how.

PERSPECTIX – COMPETENCE AND EXPERIENCE

Since its founding in 1996, Perspectix AG, with offices in Switzerland and Germany, has continually developed as a leading provider of software solutions for sales and technical project planning of variant-rich products in engineering industries. Users of P′X5 Visual Product Selling™ profit from experience in varied complementary branches: mechanical engineering, plant construction, electro-technical engineering, and logistics systems. With the unique combination of sales optimization and Product Lifecycle Management in a forward-looking technology, Perspectix is a strategic supplier for renowned manufacturers and a partner with leading IT vendors.

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